

Data Migration Patch Instructions

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Data Migration Patch Instructions

Data migration is the process of moving data from local Voluntary databases, used by the VTK system, to the national Voluntary Service System (VSS) database, used by the new VSS application. For each Voluntary site, the migration process takes place in two phases:

1. Data cleansing
2. Data transmission

Each of the phases involves the use of a software patch, which is distributed to the site IRM by SI. The data cleansing patch is referred to as Patch 31 (ABSV*4.0*31) and the data transmission patch as Patch 32 (ABSV*4.0*32). IRM will install both patches. An appointed Voluntary Services staff person will run both of them.

This section presents background information and instructions for installing and using using Patches 31 and 32. It is divided into the following subsections: Data Cleansing (Patch 31) and Data Transmission (Patch 32). Each subsection is divided into introductory material, IRM installation instructions, and Voluntary instructions for running the program.

Data Cleansing

Patch 31 allows a Voluntary station to do the following:

- Send station information to the EMC that they will use to set up the station in the new VSS application
- Check existing VTK data for errors, redundancies, and inconsistencies
- Print error reports so that Voluntary can fix the errors prior to transmitting the data to the EMC.

IRM Installation Instructions

General information:

- The patch should take less than 1 minute to load
- No existing data is changed during patch installation
- No options need to be disabled
- None of these routines are or will be mapped
- Users can be on the system when this patch loads.

Follow the steps below to install Patch 31:

1. Use the 'INSTALL/CHECK MESSAGE' option on the PackMan menu. This option will load the KIDS package onto your system.

2. From the Kernel Installation and Distribution System (KIDS) menu, you may elect to use the following options:
 - a. Verify Checksums in Transport Global - this option will allow you to ensure the integrity of the routines that are in the transport global.
 - b. Print Transport Global - this option will allow you to view the components of the KIDS build.
 - c. Backup a Transport Global - this options doesn't need to be run because all of the routines in this patch are new.
 - d. Compare Transport Global to Current System - this options doesn't need to be run because all components in this patch are new.
3. Use the Install Package(s) option and select the package ABSV*4.0*31.
4. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//', respond NO.
5. When prompted 'Want KIDS to INHIBIT LOGONs during the Install? YES//', respond NO.
6. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES//', respond NO.

Voluntary Service Instructions

After patch 31 is installed at a site, the Voluntary Service staff can begin the data cleansing process. The cleansing process will start as soon as the patch is received by the site. It should be completed not later than two weeks before the sites scheduled conversion date.

Patch 31 installs a new menu on the Volunteer Timekeeping Activity menu, called the Voluntary Data Migration Menu. This menu is locked with the already existing ABSV MGR Security Key, so that only holders of that key will be able to run the menu options. These options are performed more or less in the order they appear in on the menu.

Voluntary Data Migration Menu		
Option	Purpose	Explanation
PREP	Prepare for Transition to VSS	PREP option does some initial setup for your site and sends information that is used to establish your site on the VSS centralized server. Run this option once only.
VAL	Validate Existing Data	VAL option checks your existing data and creates a report of entries that contain inconsistent data that can be corrected before the data is sent to the new system. This option can be run as often as you like.
PRNT	Print Results of Data Validation	PRNT option displays the results of the Validate option. It can be run as often as you like.
VOL	Master Volunteer Edit	VOL option allows the user to edit all the fields they need to correct a problem with the Volunteer information.
DAIL	Daily Time Edit	DAIL option allows the user to edit all the fields they need to

		correct a problem with Regular Hours information.
OCC	Occasional Hours Edit	OCC option allows the user to edit all the fields they need to correct a problem with Occasional Hours information.
SEND	Send Voluntary Data to VSS	SEND option sends the data to the new system. It should be run only once unless SI instructs you to run it again. The Send option is installed only after Patch32 is installed to migrate the data.

The major steps in the data cleansing process are as follows:

1. Prepare Transition to VSS (PREP option)
2. Validate Existing Data (VAL option)
3. Print Data Validation Results (PRNT option)
4. Correct Data Errors (VOL, DAIL, OCC options)
5. Repeat steps 2-4 until no errors show up on the reports

These steps are described in detail in the sections below.

1. Prepare for Transition to VSS

The VSS application will contain information about the site's Voluntary Service. If the site is multi-divisional, it will contain information about each division to which Volunteer Hours are recorded. Most of the information about the Voluntary Service and its staff will be entered by Voluntary Service personnel using the new VSS web interface. However, some data is needed for initial setup of the site.

When you complete the PREP option, the EMC will have the data it needs to create your site in the VSS system. SI will contact you after your site has been initialized on VSS and the new system is ready to receive your data (Patch 32). SI will supply the e-mail address to use when running the option.

1. Select the PREP option.
2. The first seven questions are self-explanatory.
3. The questions about the User Administrator refer to the lead person at your site. That person will be responsible for entering site data and setting up other local users. Often, it will be the Voluntary Service Chief.

It is very important that this person's NT Username is entered correctly. You must enter both the domain and the username separated by a "\".

4. Enter an e-mail address for the recipient of this information. The message is sent via MailMan to a Microsoft Exchange address. SI will provide you with the necessary e-mail address. Your IRM must test that mail can be sent to the med.va.gov domain.

The sending of this message will also be a test of that domain, which will also be used when the actual data is sent. You can also send the message to local MailMan recipients.

2. Validate Existing Data

The data validation process will review all of the entries that will be moved from the VistA VTK system to the new VSS server during the migration. A report will be made containing each entry that has incorrect or inconsistent data. You can use that report to correct entries so that a complete set of data is moved to the new system.

Entries that are reported as problems will not be migrated to the new system until the problem is corrected in the VTK data. Because there are many records involved, running this option may take some time. Particularly time consuming will be the validation of the Volunteer Regular Hours.

When you run the VAL option, a dialog indicates the progress of the validation. When the check of each file is done, the number of entries with errors is displayed. After the validation finishes, you can immediately print the results. Whether you print it at this time or not, the information on incorrect entries is stored and can be printed at any later time.

The error reports are grouped by type and indicate the record number (IEN) of the record that contains the problem. For the volunteers, the name of the volunteer is also shown to help in identification.

The data validation option (VAL) can be rerun the status of your error correction efforts. You do not, however, need to rerun the option just to view the results of a prior run. You can print previous results.

3. Print Data Validation Results

You can print results of the Examination of Existing Data by selecting the PRINT option. The validation results are stored by date and time run. The simplest way to choose the results to print is to input the date that the validation was run.

In the following example, the results of validation run "TODAY" are requested. You select the specific set of data validated to print. In this example, the results for Regular and Occasional Hours are selected.

To print the results of the data validation:

1. Select the PRNT option from the VTK Data Migration menu. A list of the data validations performed appears.

Select VALIDATION RESULTS TIME RUN: TODAY OCT 04, 2002

```

1 10-4-2002@18:14:10 Organizations NO, ONLY VALIDATION
DONE
2 10-4-2002@18:14:11 Services NO, ONLY VALIDATION DONE
3 10-4-2002@18:14:11 Occasional Hours NO, ONLY VALIDATION
DONE
4 10-4-2002@18:14:11 Regular Hours NO, ONLY VALIDATION
DONE
5 10-4-2002@18:14:23 Volunteers NO, ONLY VALIDATION DONE
CHOOSE 1-5: 4 10-4-2002@18:14:11 Regular Hours NO, ONLY
VALIDATION DONE

```

The line “NO, ONLY VALIDATION DONE” means that the data was validated but not transmitted.”

2. In the top line, after “Select VALIDATION RESULTS TIME RUN:” enter “TODAY,” for today’s validation, or the date (in any form) that the validation was run.
3. In the bottom line, after “CHOOSE 1-5:” enter the number of one of the five reports that you want to view.
4. Enter “Yes” to the following print prompt:

Do you want to select another result to print?

The specified report prints and another Validation Results list appears on the screen.

5. Follow steps 2-4 above to print another report. If you do not want to print a report, enter “No” to the print prompt.

4. Correct Data Errors

You are requested to run the data validation option weeks before the actual switch to the new system so that you have the opportunity to correct invalid records. Corrected records will be migrated to the new system while those remaining with an error will be rejected.

The method of correction will depend on the problem. In some cases, you will have to contact volunteers for the information; in others, you will have to refer to paper records. When the necessary information is obtained, you will usually be able to use the existing VTK options to make the change. You can also use the three options supplied in this patch: Master Volunteer Edit, Daily Time Edit, Occasional Hours Edit. If you cannot use the normal options, contact your local IRM. If your local IRM cannot resolve the issue they should file a NOIS report, and NVS will assist in getting the problem resolved.

Error Correction Example:

Volunteer record #3418 with Name MAYO,MARION has incorrect sex data.

This error means that a volunteer with record number 3418 in the Voluntary Master file, whose name is Marion Mayo, has incorrect information in the SEX field. It is unimportant

how that erroneous data got there. If you determined that Marion was a woman, you would correct the error by using the Register/Edit Volunteer in the Master File option, as follows:

Select Master File Maintenance Menu Option: Register/Edit Volunteer in Master File

Select Volunteer Name: `3418 MAYO,MARION

You select the volunteer by putting an accent grave (`) in front of the entry number from the error report. This method should work for any data you are correcting, regardless of file. In this case, you could have also used the name.

Do you wish to Add/Edit Volunteer specific data? YES//<RET> (YES)

NICKNAME: <RET>
PSEUDO INDICATOR: <RET>
SOCIAL SECURITY NUMBER: 999-99-9999// <RET>
STREET ADDRESS #1: 1 Main St.// <RET>
STREET ADDRESS #2: <RET>
CITY: MORENO VALLEY// <RET>
STATE: CALIFORNIA// <RET>
ZIP CODE: 92553// <RET>

Here the source of the error is clear. Somehow a "Z" was input into the SEX field. The data validation option identified this as being incorrect. This particular error is corrected by changing the "Z" to an "F" for Female.

SEX: Z// F Female, 21 and over
BIRTH DATE: JUL 1970// ^
Do you wish to continue to the next section? YES// NO (NO)
Do you need to transmit this record to Austin? YES// NO (NO)
< No Action Taken>

Now, Marion's entry and the entries of the Regular Hours that she worked can be sent to the new system.

5. Repeat Validation and Correction (steps 2-4)

The validation and correction steps can be run as many times as necessary. Keep running them until all the errors listed in the report are gone. The data cannot be migrated with errors remaining.

Data Transmission

Patch 32 (ABSV*4.0*32) is used to send the corrected to the EMC, where it becomes part of the national VSS database. It contains the SEND option, which appears on the

VTK Data Migration menu. This option transmits the entire Voluntary site data to the EMC over the VA network, through a Microsoft Outlook e-mail message.

The IRM runs Patch 32. After Voluntary has corrected all the database errors located by Patch 31, SI will send the IRM Patch 32. When SI notifies the IRM through e-mail that the new system is prepared to accept the site's data, you can proceed to use the SEND option to transmit the data. **Only one person at the site should run this option.**

SI will provide the IRM with the e-mail addresses for sending the data. This may include a local mail address for possible troubleshooting purposes. The addresses used for the test run will not be the same as the go-live, production database run.

The export of local data will take place without user intervention. The program will tell you how many records were not sent because of errors, and allow you to print the errors. SI will inform IRM and Voluntary when the data has been received and stored into the new system. It will also inform you when Voluntary should start using the new, web-based Voluntary Service System.

Two Iterations: Production and Test

There are two iterations of data transmission. The first will occur during the two weeks prior to actual migration ("go-live") date. This will be a practice run: the data will go to a test database at the EMC. The EMC may notify you of errors and ask the IRM to correct them (with SI's assistance) before resending the data.

The second iteration will be on the go-live date. This time the transmitted data will go into the production database. **During the production iteration, the IRM will disable all the other VTK Data Migration menu options (PREP, VAL, PRNT, etc.) out of service before transmitting with the SEND option.** It should also disable the auto-login kiosk. During data transmission Volunteer staff should log hours manually and supply the canteen with a list of volunteers entitled to receive a meal.

IRM Data Transmission Steps

When Patch 32 is received from SI, the IRM should follow the steps below:

1. Install Patch 32 for Voluntary Services
2. Disable the auto-login Kiosk (production iteration only).
3. Disable all VTK Data Migration menu options except SEND (production iteration only).
4. When notified by SI that transmission was successful, enable the auto-login kiosk (production iteration only).

Voluntary Data Transmission Steps

When directed to send data by SI, follow the steps below:

1. Select SEND option from the Voluntary Data Migration menu in VTK application.
2. When prompted, enter the e-mail addresses supplied by SI.

3. Print any errors reported by the program.
4. Report immediately to SI any problems that occur during the migration process.
5. Wait to receive one of the following notifications from SI:
 - There are problems with the data or transmission that need to be fixed
 - That the transmission was successful, the site was created, and Voluntary should begin using the VSS application.

